



Recent updates & findings

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ON BEHALF OF THE ICPS RESEARCH TEAM



Disclosures

 **NO INDUSTRY FUNDING OR INTERESTS TO DECLARE.**

CONSULTANT / PAID SPEAKER / ADVISORY COMMITTEES

- Regulatory agencies e.g., Canada, Australia, UK, EC, US CDC, etc.
- Non-governmental associations e.g., CCS, Heart & Stroke Foundation
- International public health authorities e.g., WHO

PAID EXPERT TESTIMONY – PUBLIC HEALTH LITIGATION

Tobacco

- Canada, Norway, Australia, UK, Ireland, Uruguay, Uganda, NB, AB, Class actions

Vaping

- Canada, provinces

Cannabis

- Canada, Quebec

Food & beverage

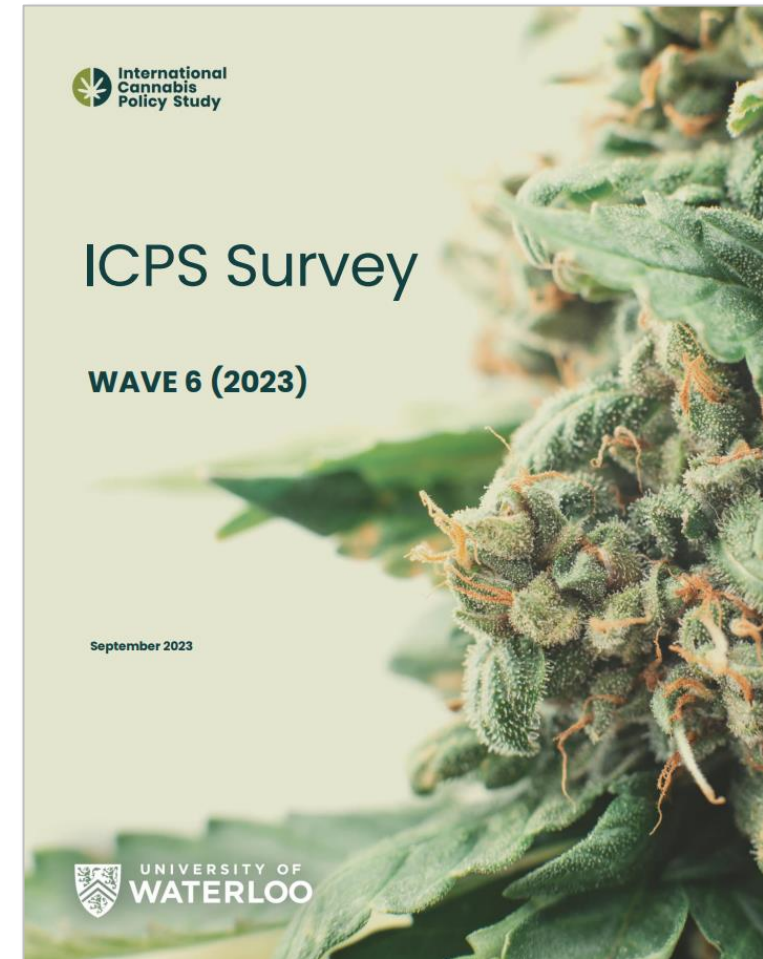
- San Francisco

ICPS Study

- National surveys
- Repeat cross-sectional design
- Annual data collection SINCE 2018
- Ages 16–65

2018–		2021–		2023–	
					
USA 'Illegal' 'Medical' 'Recreational'	CANADA 'Recreational'	AUSTRALIA Medical	NEW ZEALAND Medical	GERMANY 'Recreational'*	UK Medical

~300,000 respondents
~66,000 cannabis consumers
(and three babies)



<https://cannabisproject.ca/methods/>

GERMANY

Different legal models...

Cannabis users celebrate relaxation of laws on personal use in Germany

People gather for a 'smoke-in' at Berlin's Brandenburg Gate after partial legalisation comes into effect



<https://www.theguardian.com/world/2024/apr/01/germany-legal-cannabis-weed-laws-personal-use>

State-level changes in the legal status of cannabis 2018–2023

	Wave 1 2018	Wave 2 2019	Wave 3 2020	Wave 4 2021	Wave 5 2022	Wave 6 2023
Georgia	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Idaho	Illegal	Illegal	Illegal	Illegal	Illegal	Illegal
Indiana	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Iowa	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Kansas	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Kentucky	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Nebraska	Illegal	Illegal	Illegal	Illegal	Illegal	Illegal
North Carolina	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
South Carolina	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Tennessee	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Texas	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Wisconsin	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Wyoming	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*	Illegal*
Mississippi	Illegal	Illegal	Illegal	Illegal	Medical	Medical
South Dakota	Illegal	Illegal	Illegal	Medical	Medical	Medical
Alabama	Illegal	Illegal	Illegal	Medical	Medical	Medical
Utah	Illegal	Medical	Medical	Medical	Medical	Medical
Missouri	Illegal	Medical	Medical	Medical	Medical	Recreational
Arkansas	Medical	Medical	Medical	Medical	Medical	Medical
Florida	Medical	Medical	Medical	Medical	Medical	Medical
Hawaii	Medical	Medical	Medical	Medical	Medical	Medical
Louisiana	Medical	Medical	Medical	Medical	Medical	Medical
New Hampshire	Medical	Medical	Medical	Medical	Medical	Medical
North Dakota	Medical	Medical	Medical	Medical	Medical	Medical
Ohio	Medical	Medical	Medical	Medical	Medical	Medical
Oklahoma	Medical	Medical	Medical	Medical	Medical	Medical
West Virginia	Medical	Medical	Medical	Medical	Medical	Medical
Pennsylvania	Medical	Medical	Medical	Medical	Medical	Medical
Minnesota	Medical	Medical	Medical	Medical	Medical	Recreational
Maryland	Medical	Medical	Medical	Medical	Medical	Recreational
Delaware	Medical	Medical	Medical	Medical	Medical	Recreational
Rhode Island	Medical	Medical	Medical	Medical	Recreational	Recreational
Arizona	Medical	Medical	Medical	Recreational	Recreational	Recreational
Connecticut	Medical	Medical	Medical	Recreational	Recreational	Recreational
Montana	Medical	Medical	Medical	Recreational	Recreational	Recreational
New Jersey	Medical	Medical	Medical	Recreational	Recreational	Recreational
New Mexico	Medical	Medical	Medical	Recreational	Recreational	Recreational
New York	Medical	Medical	Medical	Recreational	Recreational	Recreational
Virginia	Medical	Medical	Medical	Recreational	Recreational	Recreational
Illinois	Medical	Medical	Recreational	Recreational	Recreational	Recreational
Michigan	Medical	Recreational	Recreational	Recreational	Recreational	Recreational
Alaska	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
California	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Colorado	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Maine	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Massachusetts	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Nevada	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Oregon	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Vermont	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Washington, DC	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational
Washington State	Recreational	Recreational	Recreational	Recreational	Recreational	Recreational

Sample sizes

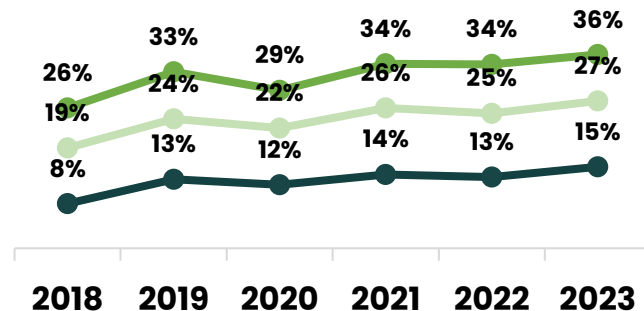


	2018	2019	2020	2021	2022	2023
All states	17,112	30,479	29,900	30,081	40,420	39,653
'Illegal' states	3,696	4,237	5,426	4,583	4,474	4,397
'Medical' states	6,018	6,038	7,082	5,557	9,255	5,325
'Recreational' states	7,398	20,204	17,392	19,941	26,691	29,931

187,645 respondents
~60,000 consumers

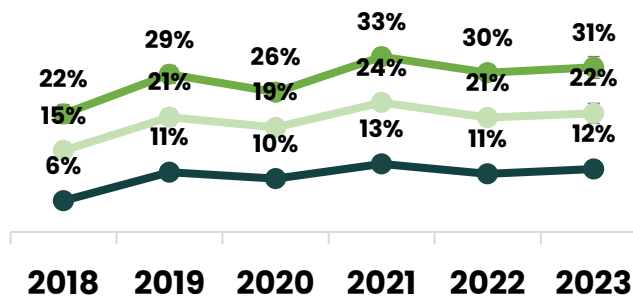
Prevalence of cannabis use – trends over time

US total n=187,645

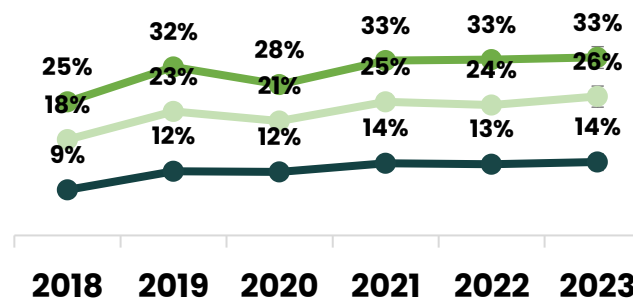


— Past 12 months — Monthly — Daily/near daily

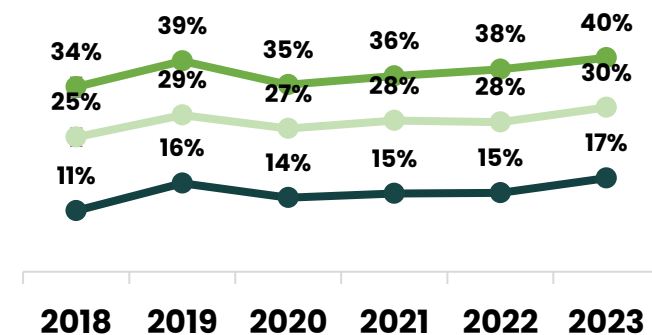
Illegal states n=26,813



Medical states n=39,275

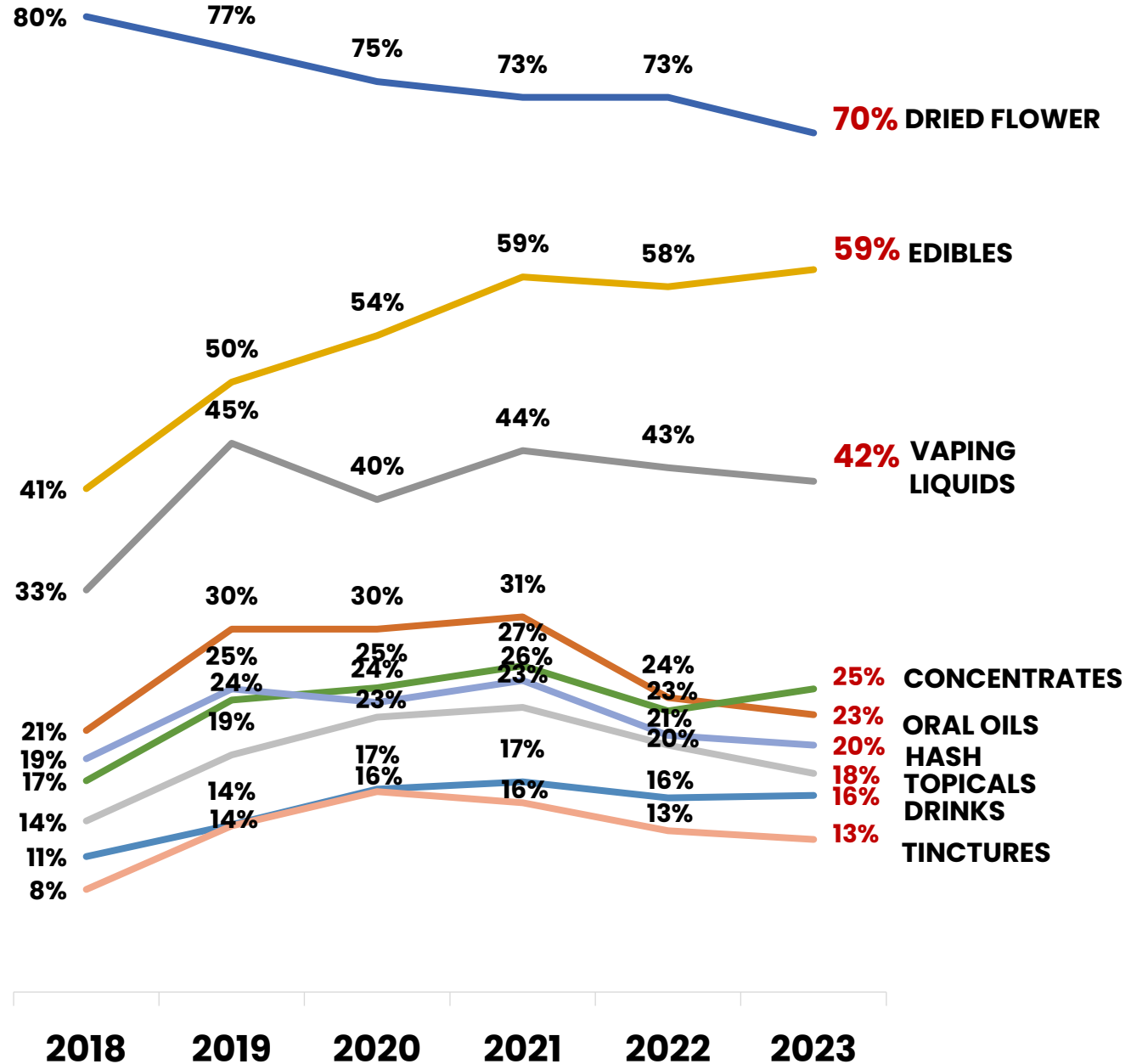


Legal states n=121,557



Type of cannabis products used in the past 12-months

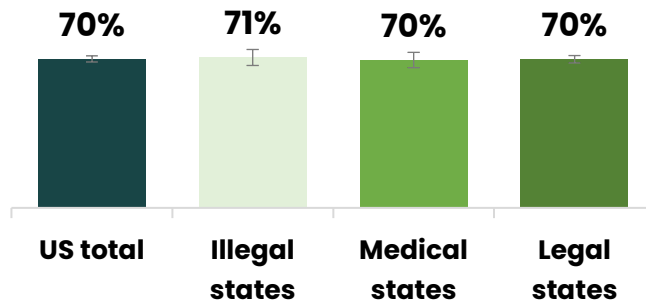
AMONG PAST 12-MONTH CONSUMERS
N=15,162



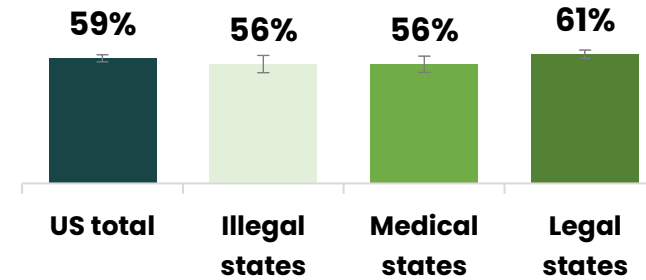
Type of cannabis products used in the past 12-months

AMONG PAST 12-MONTH CONSUMERS N=15,162

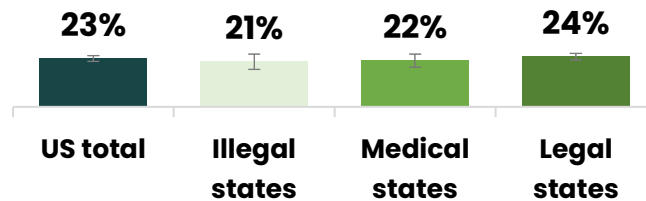
Dried herb



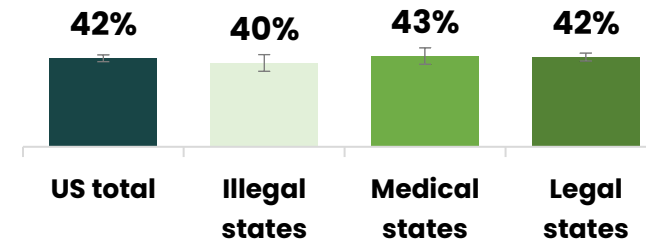
Edibles



Drops or capsules



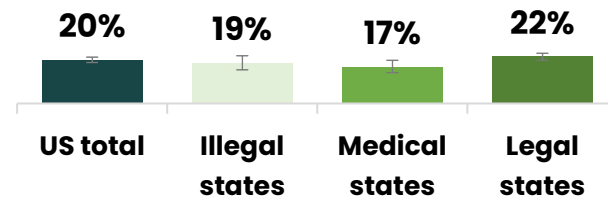
Vape oils



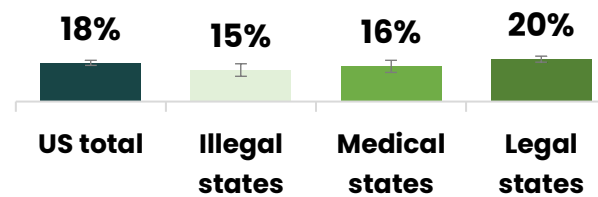
Type of cannabis products used in the past 12-months

AMONG PAST 12-MONTH CONSUMERS N=15,162

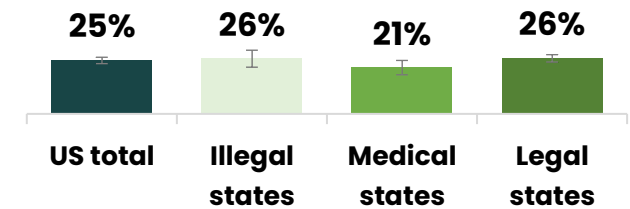
Hash or kief



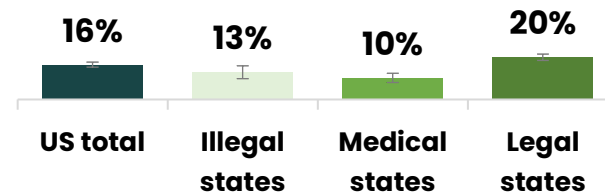
Topicals



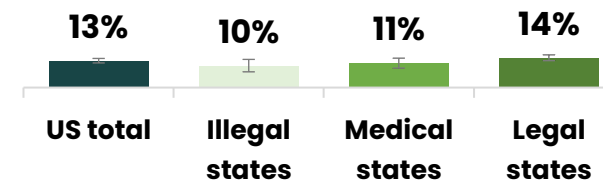
Solid concentrates



Drinks

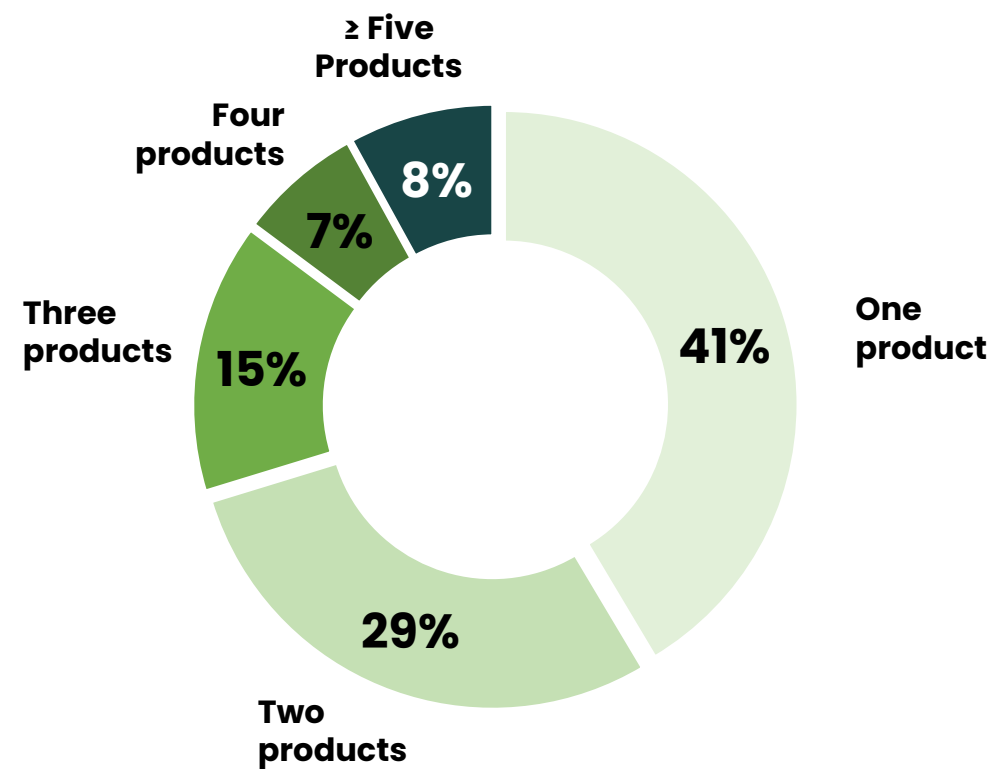


Tinctures



Number of cannabis products used 'monthly'

AMONG PAST 30-DAY CONSUMERS N=10,214

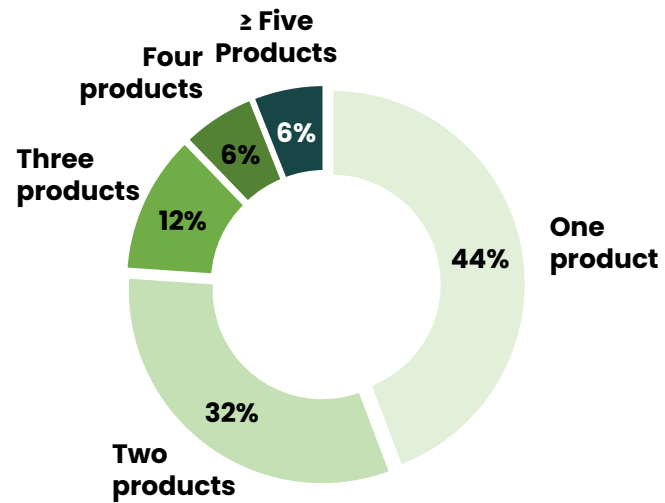


Number of cannabis products used 'monthly'

AMONG PAST 30-DAY CONSUMERS N=10,214

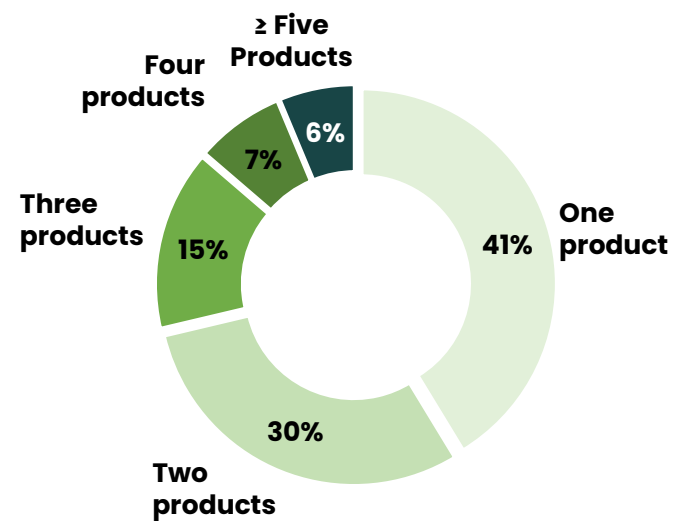
'Illegal' states

N=787



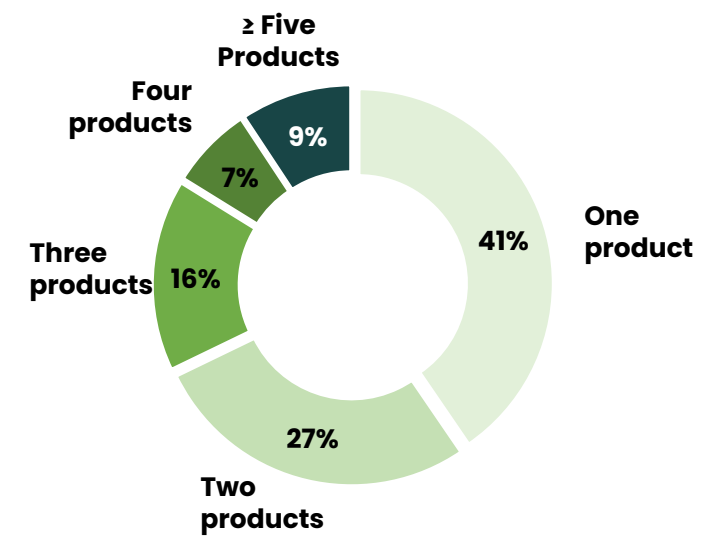
'Medical' states

N=1,101



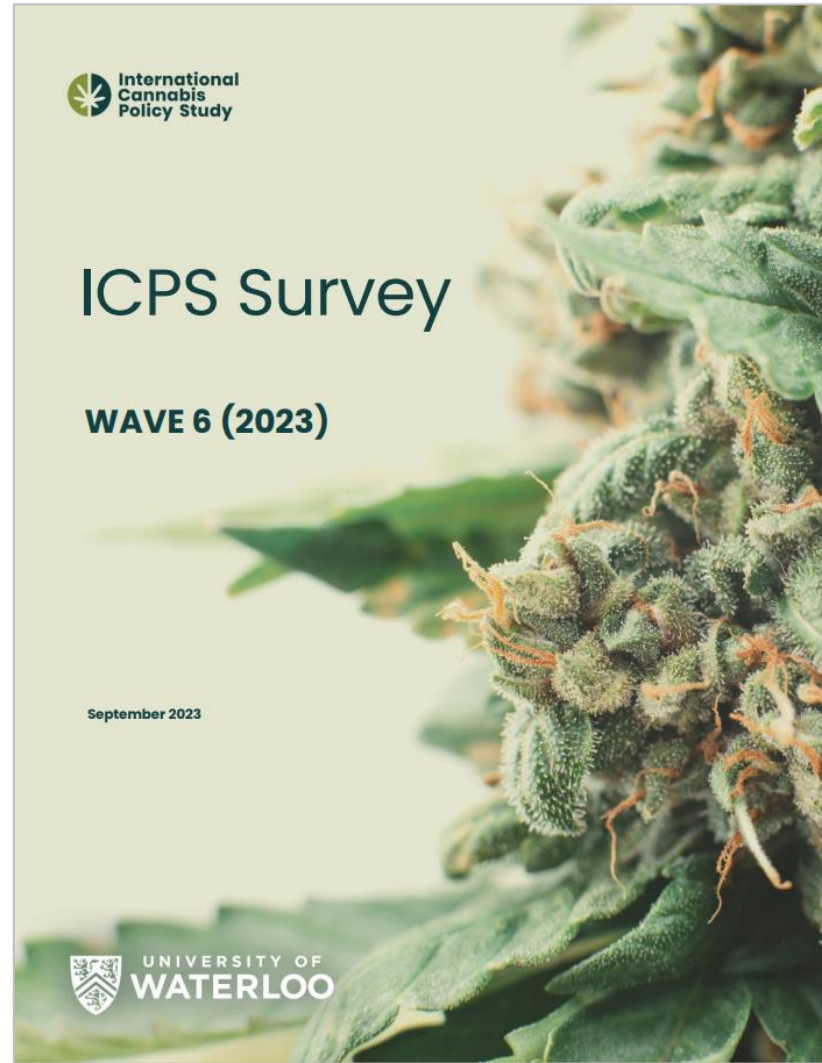
'Recreational' states

N=8,326



2024

NEW!



Categorizing products

There are many different types of products made from cannabis. We'd like to ask you about two main types:

1. MARIJUANA AND CANNABIS PRODUCTS THAT MAKE PEOPLE FEEL 'HIGH'

Some US states have recently legalized marijuana products for 'medical' and/or 'recreational' use.

Some newer products made from hemp have been marketed recently that can also make you feel high – like THCA, Delta-8, Delta-10 HHC, and THCO-acetate."

2. CBD-ONLY PRODUCTS THAT DON'T MAKE PEOPLE FEEL 'HIGH'

Products that contain ONLY CBD do not make people feel "high" and are often marketed as health or 'wellness' products.

CBD-only products are legal in most US states, and are often sold in grocery stores, gas stations, malls, and online.]

Which of these products did you use in the past 12 months?

1=Marijuana/cannabis only

2=CBD products only

3=Both marijuana/cannabis and CBD-only products

4=I haven't used any of these products

Did you include CBD-only products when telling us about the marijuana products you used in the last section of the survey?

AMONG PAST 12-MONTH CONSUMERS WHO REPORTED USING A NON-THC CONTAINING 'CBD-ONLY' PRODUCT

ONLY USE CBD-ONLY PRODUCTS

N=323

Yes	81%
No	9%
Don't know	10%

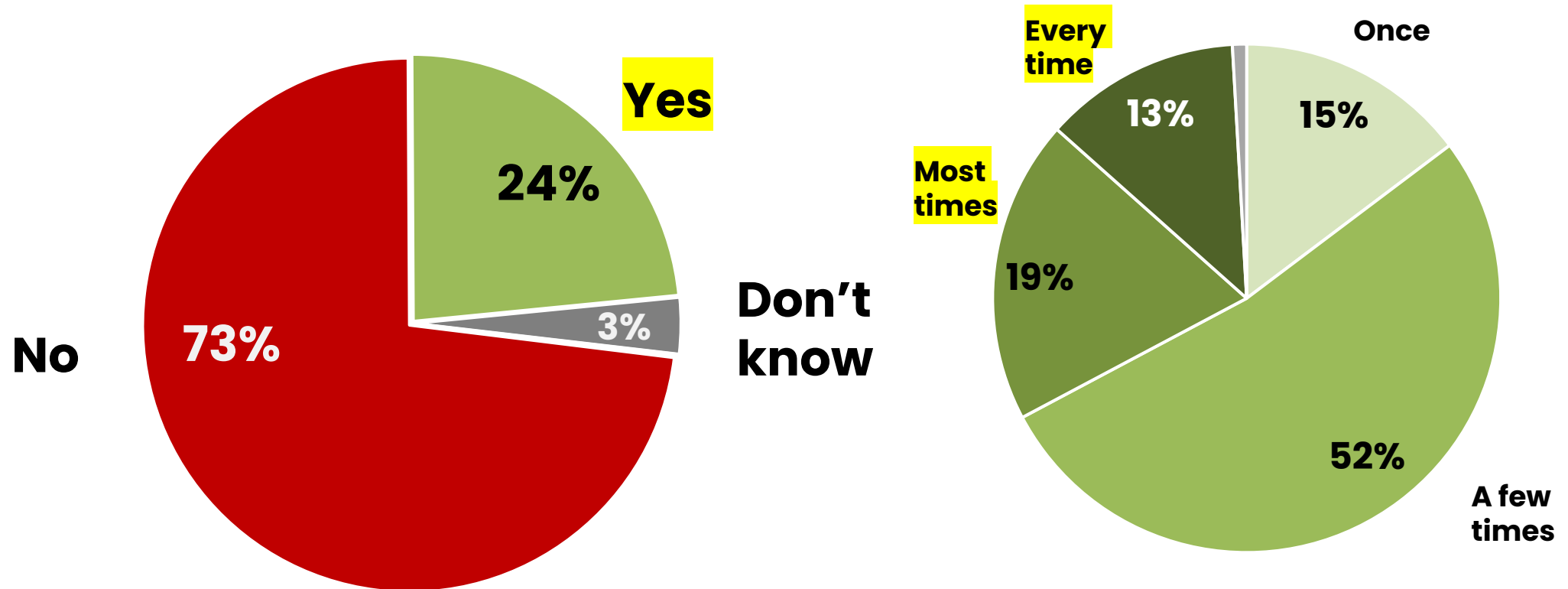
USE CANNABIS & CBD-ONLY PRODUCTS

N=2,645

Yes	67%
No	26%
Don't know	7%

In the last 12-months, have you ever felt 'high' from using a CBD-only product?

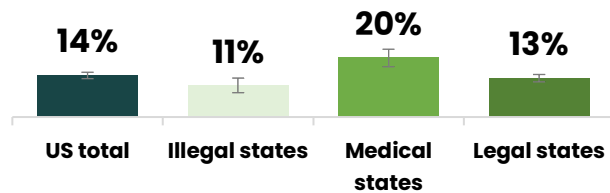
AMONG PAST 12-MONTH CONSUMERS WHO REPORTED USING A NON-THC CONTAINING 'CBD-ONLY' PRODUCT
n=7,618



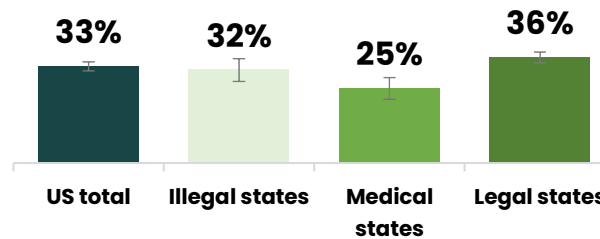
Use of cannabis for medical or recreational reasons

Among past 12-month consumer, 2023 N=15,031

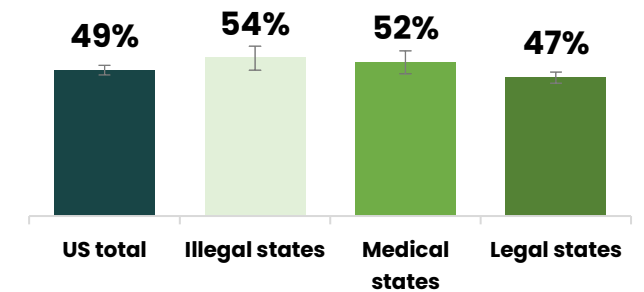
Medical use only



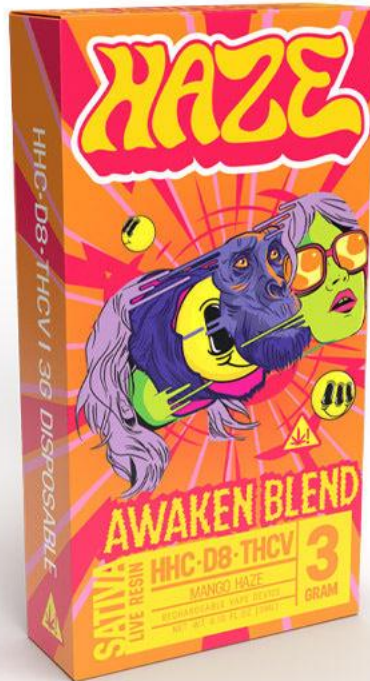
Recreational use only



Medical & recreational use



'New' product categories...

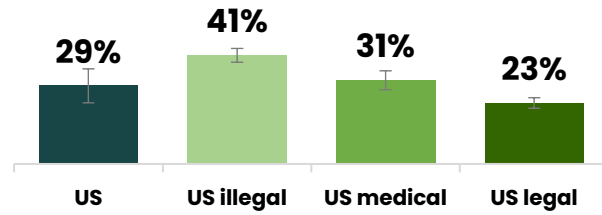


Use of 'novel' products markedly lower in Canada vs. US.

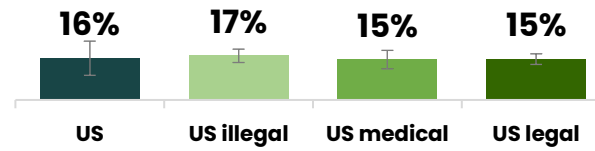
Heard of 'novel' products

AMONG ALL RESPONDENTS 2023 N=39,653

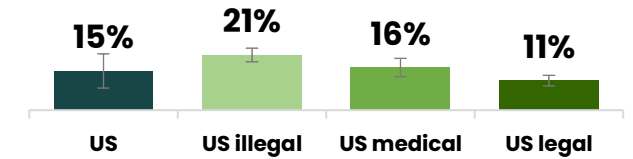
Delta 8



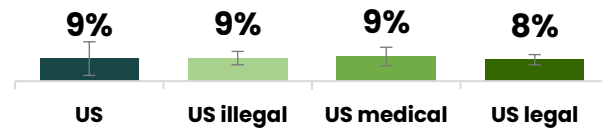
THCA



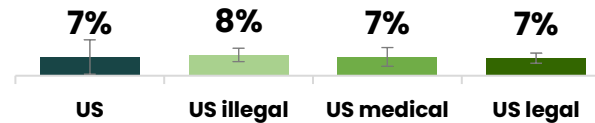
DELTA 10



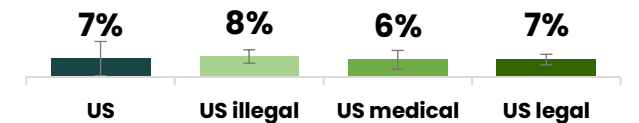
THC-P



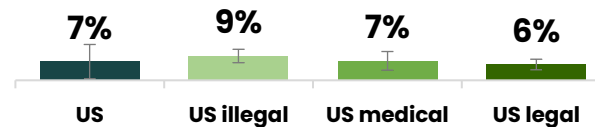
THC-O



HHC



DELTA 4*

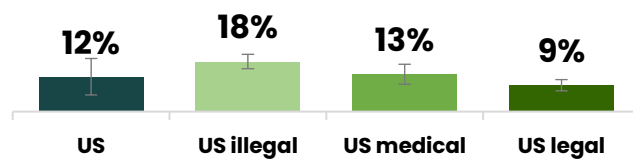


*Included as a 'bogus' comparator.

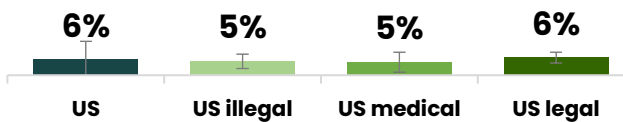
'Novel' products – Ever use

AMONG ALL RESPONDENTS 2023 N=39,653

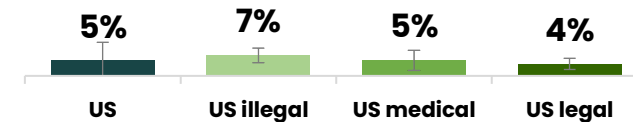
Delta 8



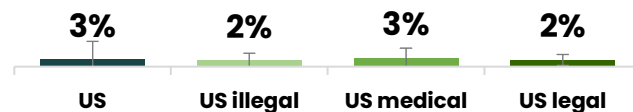
THCA



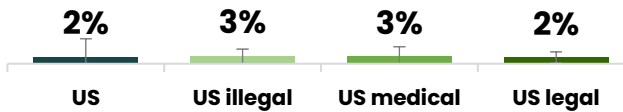
DELTA 10



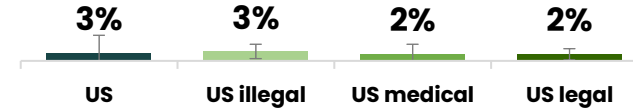
THC-P



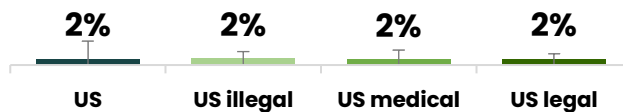
THC-O



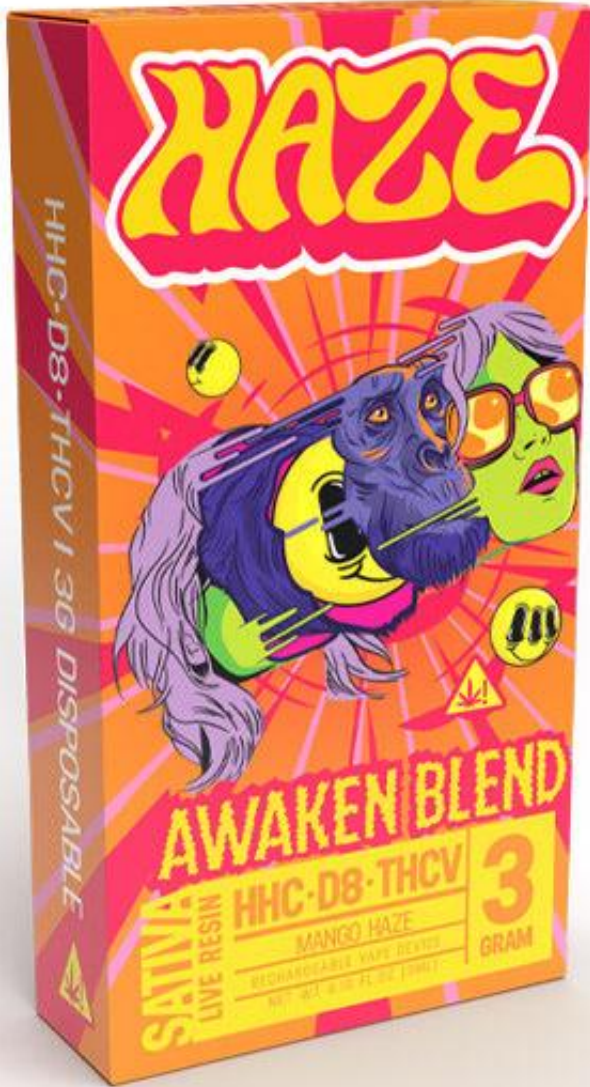
HHC



DELTA 4*



*Included as a 'bogus' comparator.

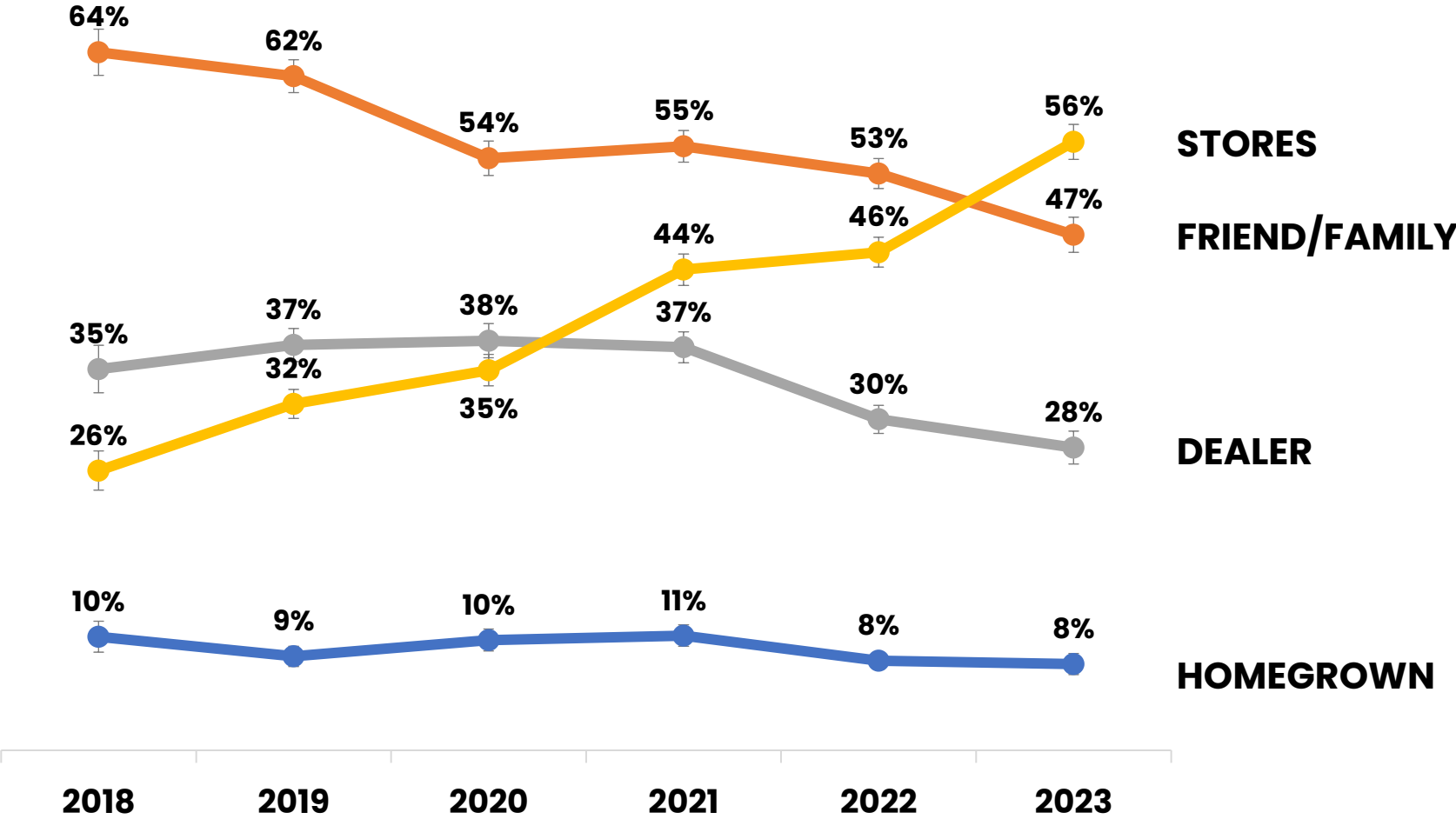


Novel product details...

- Ever heard
- Ever use
- Past 30-day use
- Main reason for use
- Product type(s)
- Purchase product
- Report as marijuana product?
- Purchase location / delivery
- Money spent
- Product image upload

Cannabis sources in the past 12-months

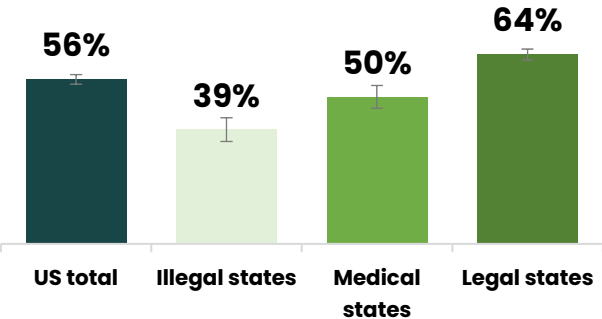
AMONG PAST 12-MONTH CANNABIS CONSUMERS N=64,054



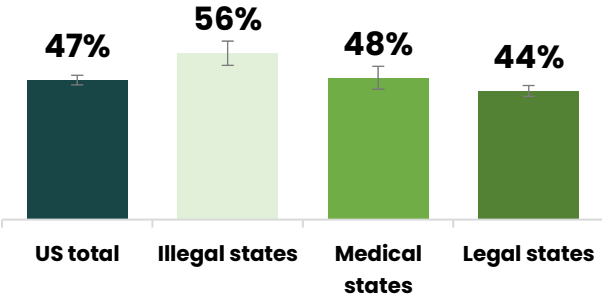
Cannabis sources in the past 12-months

AMONG PAST 12-MONTH CANNABIS CONSUMERS, 2023 N=15,162

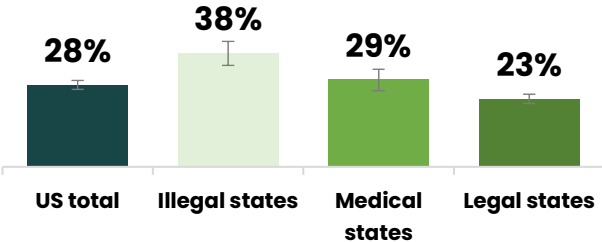
Store, co-op, or dispensary



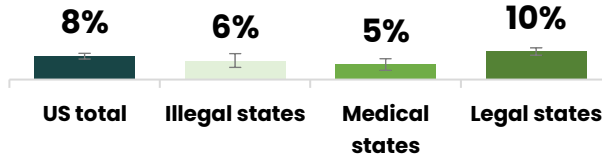
Family member or friend



Dealer



Made or grew my own



ILLEGAL MARKET ACCESS

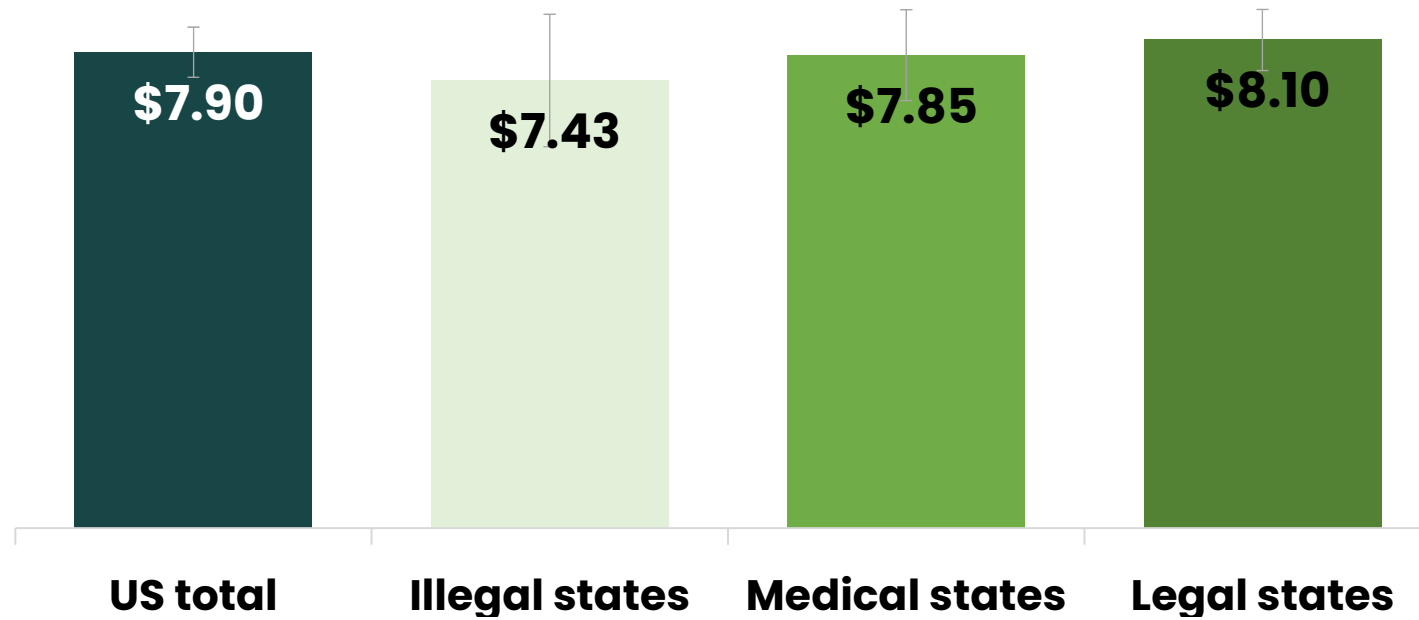
How did you contact the dealer and arrange the sale?

AMONG PAST 12-MONTH CONSUMERS WHO USED A DEALER IN THE PAST 12 MONTHS, 2023 N=3,359

Text	31%
In person	28%
Call	21%
Over social media	7%
Encrypted messaging app E.g., WhatsApp, Telegram, Signal	4%
Other	3%

Price paid for dried flower at last purchase

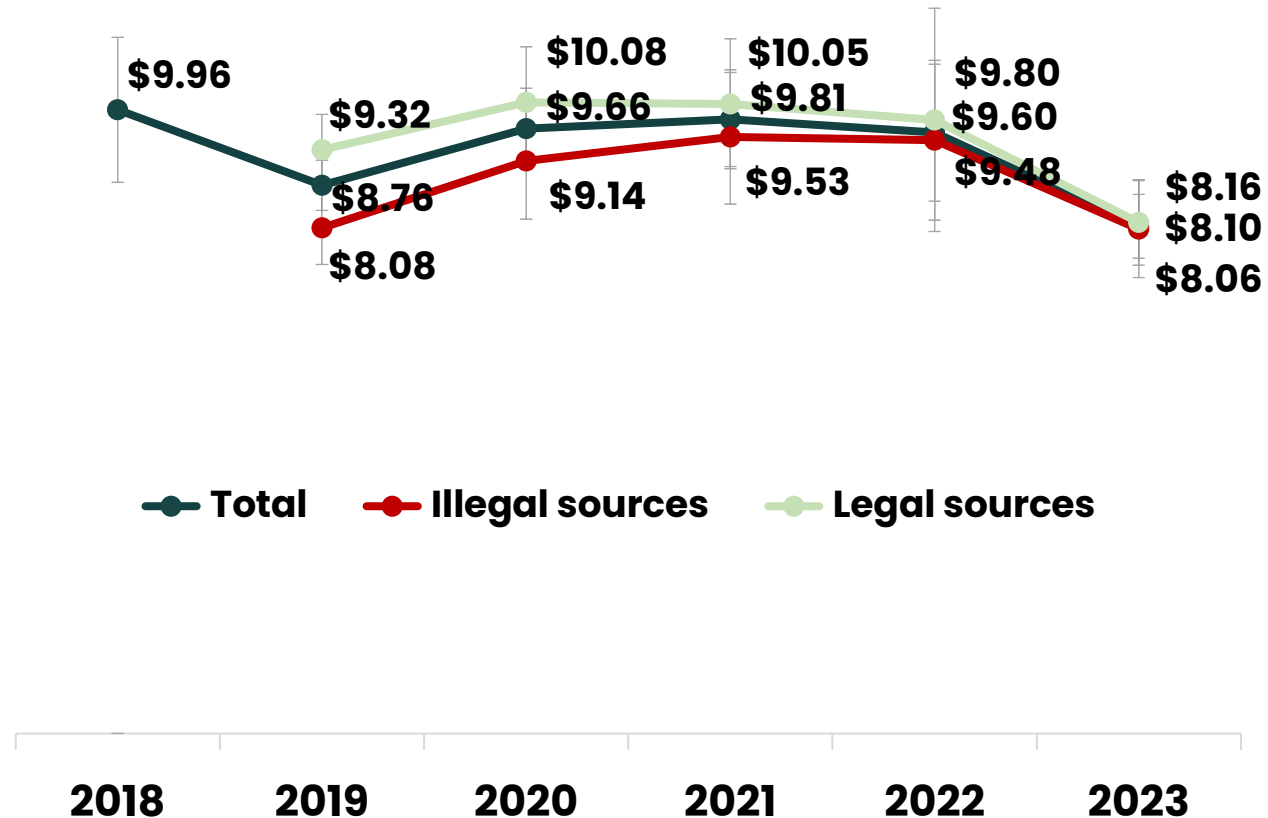
Sales weighted price-per-gram, 2023 (N=6,555)



Price paid for dried flower at last purchase

Legal states since 2018

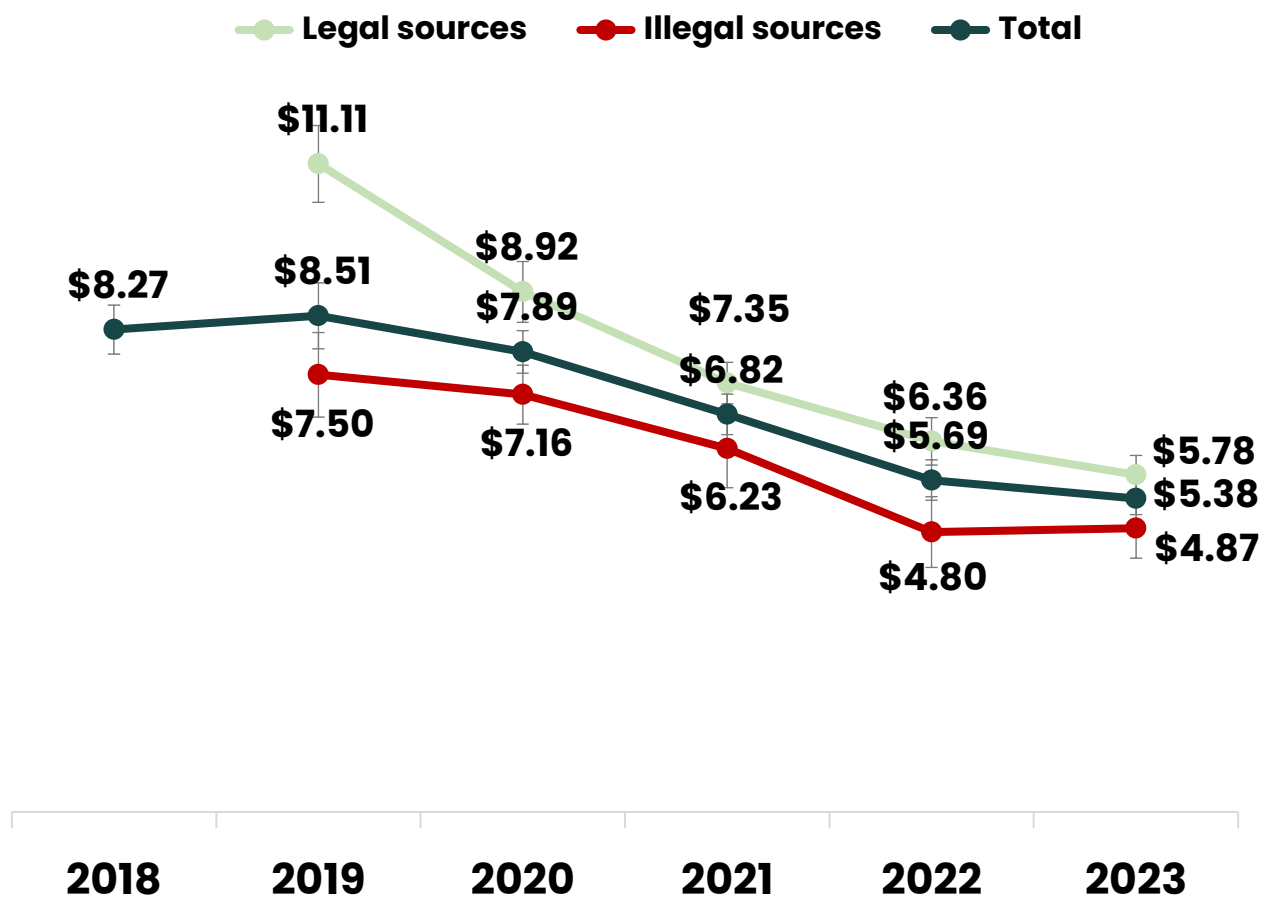
AK, CA, CO, ME, MA, NV, OR, VT, and WA
Sales weighted price-per-gram, (N=19,307)





Price paid for dried flower at last purchase

SALES WEIGHTED PRICE-PER-GRAM, 2018-2023 n=11,733



CANNABIS USE DISORDER (CUDIT)

How often do you use cannabis in situations that could be physically hazardous, such as driving, operating machinery, or caring for children?

AMONG PAST 12-MONTH CONSUMERS 2023 N=15,162

Never	74%
Less than monthly	6%
Monthly	4%
Weekly	5%
Daily or almost daily	4%
Don't know	5%

PSYCHEDELICS

Have you ever used any of the following?

ALL RESPONDENTS 2023 N=39,653

Any psychedelic	26%
Magic mushrooms /psilocybin	13%
LSD / ACID	11%
MDMA	7%
Ketamine or esketamine	3%
Mescaline or peyote	3%
PCP	3%
5-MeO-DMT	1%
Ayahuasca	1%
Ibogaine	<1%

Recent publications

<http://cannabisproject.ca/findings/>

Cannabidiol-only (CBD) product use in Pregnancy in the United States and Canada.

Obstetrics & Gynecology 2024.

Adverse outcomes of cannabis use in Canada, before and after legalization of non-medical cannabis.

BMJ Open 2024.

Cannabis-related arrests and convictions in Canada: Differences by race/ethnicity, individual socioeconomic factors and neighborhood deprivation.

Journal of Ethnicity in Substance Abuse, 2024.

Social norms for cannabis use following non-medical legalization in Canada.

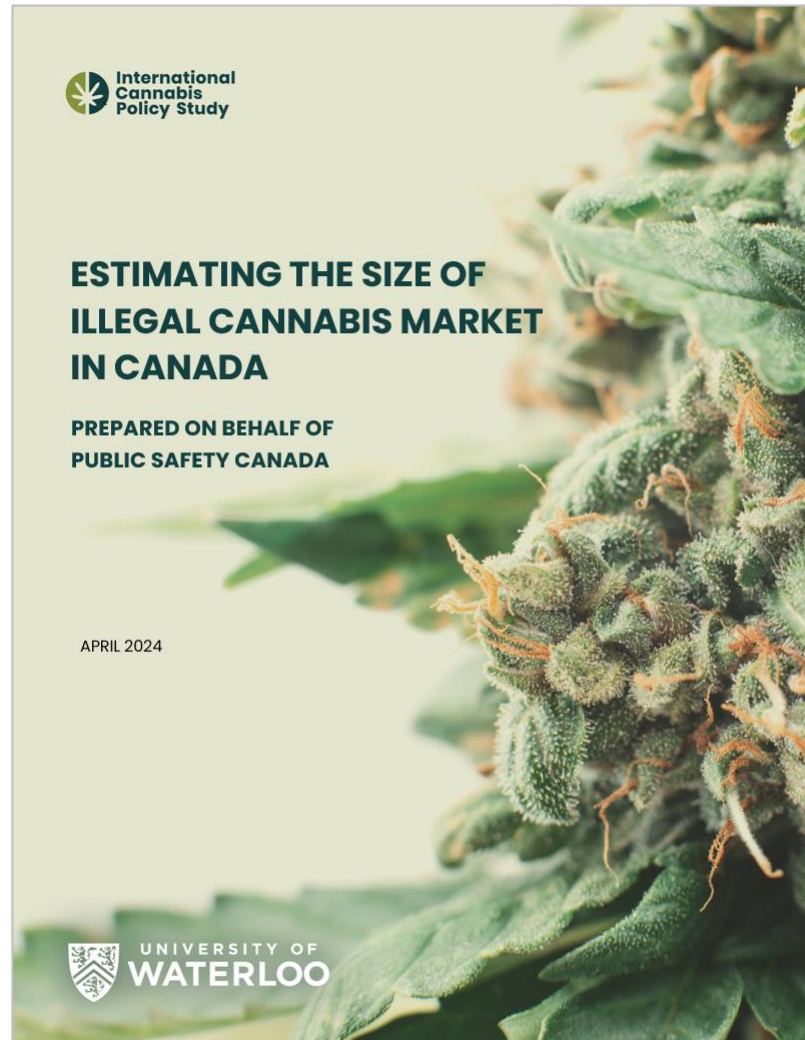
American Journal of Preventive Medicine, 2023.

Illicit cannabis report

- **US cannabis rescheduling review – DHHS report**
- **FDA reports**
- **UN World Drug Report 2022**
- **Cannabis Act Legislative review – Canada**
- **NASEM cannabis report**



Illicit cannabis and legal market capture



Self-reported expenditures vs. retail sales

Oct 2021–Sept 2022

	Self-reported legal expenditures (millions)	'Actual' legal sales ¹ (millions)	Difference (%)
Canada	\$5,148	\$5,287	–3%
Provinces			
Alberta	\$857	\$906	–5%
BC	\$720	\$742	–3%
Ontario	\$2,028	\$2,175	–7%
Quebec	\$702	\$679 ²	+3

SOURCES: ¹ HEALTH CANADA; ² STATISTICS CANADA (INCL. ESTIMATED SALES TAX)



Legal market capture

SELF-REPORTED EXPENDITURES FROM LEGAL SOURCES, OCT 2021-2022*

78% of all expenditures from legal sources

83%

DRINKS



81%

VAPES



79%

CAPSULES



78%

FLOWER



77%

EDIBLES



77%

DROPS



73%

**SOLID
EXTRACTS**



63%

HASH





State reports

MAY 2024



Washington 2022 CANNABIS REPORT

MAY 2023



UNIVERSITY OF
WATERLOO

2024 ICPS data collection

- **Funding renewed for 2023–2028**
- **ICPS UK & Germany**

Timelines

MAY / JUNE

Expressions of interest/agreements

JUNE 15

New measures/content

2024 SURVEYS

New questions?

- Use in pregnancy
- Workplace injuries
- Policy support for specific measures





Let us know if we can help.

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